



## *Aging and Disability Services*

*An Office of the  
Department of Health and Human Services*

*Paul R. LePage, Governor*

*Mary C. Mayhew, Commissioner*

# ***OADS Developmental Services*** **EIS PCP Assessment** **USER MANUAL**

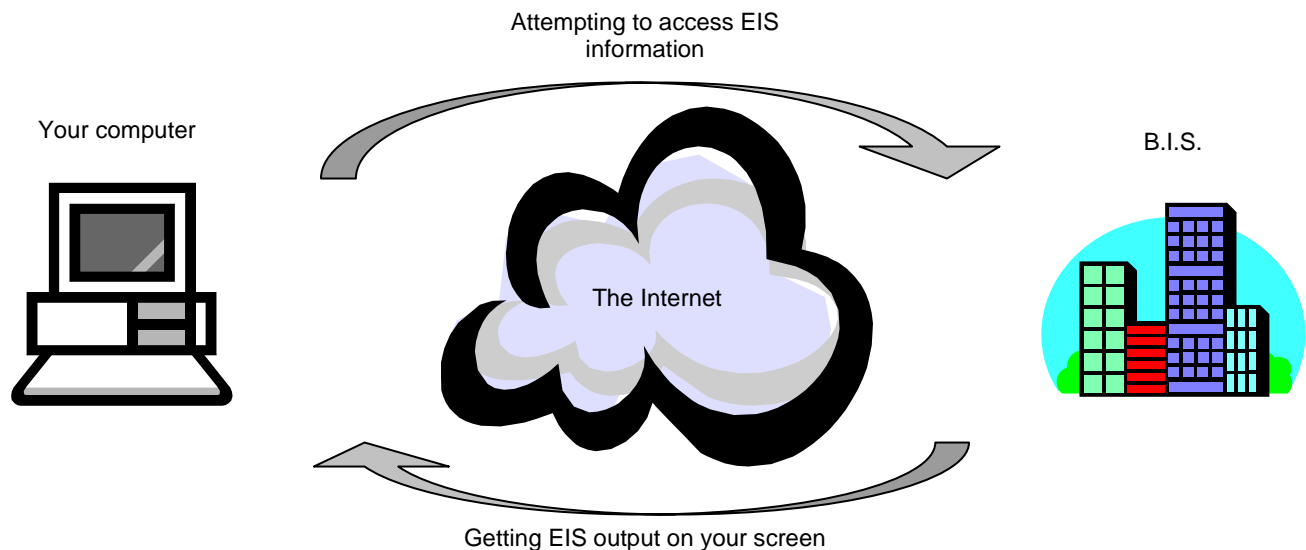
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## What is EIS

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The EIS is an Enterprise Information System that is used to track data for all people and organizations related to or served by the Department of Health and Human Services, Aging and Disability Services. The EIS allows for the integration of data across all service populations and providers.







Think of the EIS as a toolbox, from which you will be able to pull tools that will help you with your job; and just as every carpenter knows, you have to know which tool to use to get the job done right.



## Components

---

EIS is comprised of several component systems. These are tools in the EIS toolbox available to help you do your job. Each user profile within the system has access to specific tools. For PCP users, the tools are:

Component	Description
<b>People</b> 	Information for all people related to or served by the Office of Aging and Disability Services.
<b>My Events</b> 	Utilized for quick access to clients by adding available clients to My Clients list.
<b>Assessments</b> 	Used for all sorts of assessment tools. The PCP assessment will be located in this menu.
<b>Notes</b> 	Allows for capturing narrative text on service recipient's PCP and related team meetings notes. Notes will be attached directly to the PCP through the Notes region of the PCP assessment.

# Accessing EIS

You will be accessing the Enterprise Information System (EIS) through the Internet using Internet Explorer. The link to EIS can be found from the Behavioral Health Data Center home page. (\*\*Note: EIS will ONLY work with the Internet Explorer browser. Currently, EIS has only been tested to up to Version 8 of EIS. If you happen to have a newer version, please contact your local IDS (Incident Data Specialist) within your District for instructions on how to make your system compatible. \*\*)

<http://www.maine.gov/dhhs/bh/EISsystem/InternetIndex.html>

Above is the web address to the Behavioral Health page. This page provides you with the button to Log onto EIS. (\*\*Note: This should be the page that you bookmark (favorite) and/or create a shortcut for your desktop\*\*):

## 1. Click on the *Log onto EIS* button

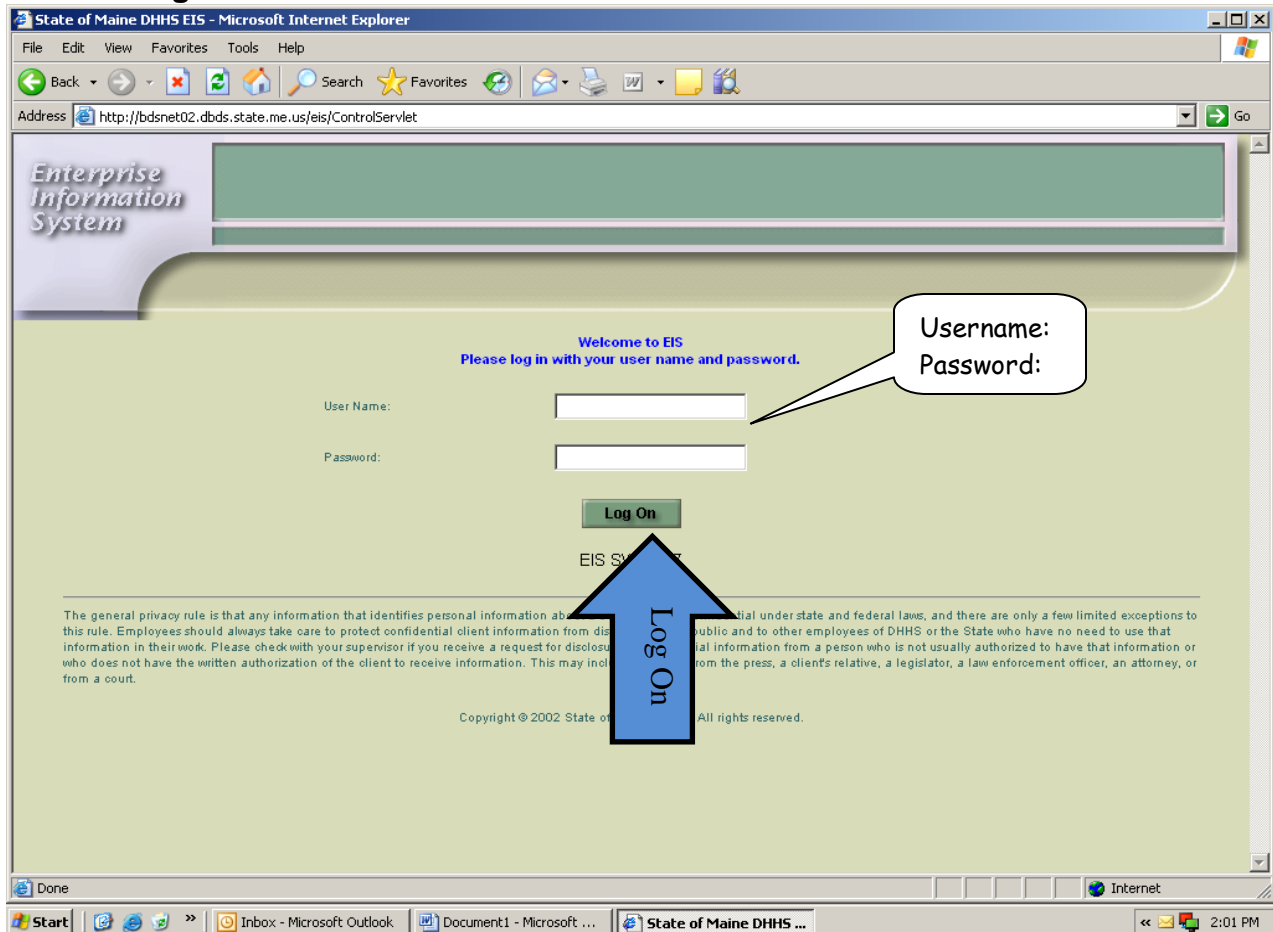


This will bring you to the **Log on** screen for EIS. This is where you will enter your *Username* and *password*.

Username:

Password: (it is case sensitive).

## 2. Click **Log On**



*(If you try three times and lock yourself out of the system then you will need to contact Lisa Merrill to reset your password)*

- 493-4121  
[Lisa.Merrill@maine.gov](mailto:Lisa.Merrill@maine.gov)

### **Note:**

Your username is unique to you and it determines your security access in the EIS system. If you find that you need additional information or functionality that you cannot currently access, contact your supervisor.

## The EIS Home Page

The first page of the EIS that appears after logging on is the *Home* page. You can access this page at any time by clicking **HOME** in the EIS menu bar.

The screenshot shows the EIS Home Page in a Windows Internet Explorer browser window. The browser's address bar displays the URL <https://portal.maine.gov/eis/ControlServlet>. The page features a green header bar with the text "My Events" and links for "Change People", "Change Organization", and "Clear". A message area on the right side of the header displays the text "LIBA MARIE MCGRATH at APPLE APPLIANCE June 04, 2012". The main content area is divided into three sections: "My Clients", "My Reports", and "My Inbox". Each section contains a table with columns for ID, Name, Date of Birth, Gender, and Set Anchor. The "My Clients" table has a "Viewing 0 - 0 of 0" status. The "My Reports" table has a "Viewing 0 - 0 of 0" status. The "My Inbox" table has a "Viewing 0 - 0 of 0" status. A left sidebar contains the "EIS Menu Bar" with links for HOME, MY EVENTS, SEARCH, PEOPLE, ASSESSMENTS, NOTES, ADA, INSTRUCTIONS, SUPPORT, and LOG OFF. The "EIS Logo" is located at the top left of the page. Labels with arrows point to the "EIS Logo", "EIS Menu Bar", "EIS Header", and "Message Area".

**EIS Logo**

**EIS Menu Bar**

**EIS Header**

**Message Area**

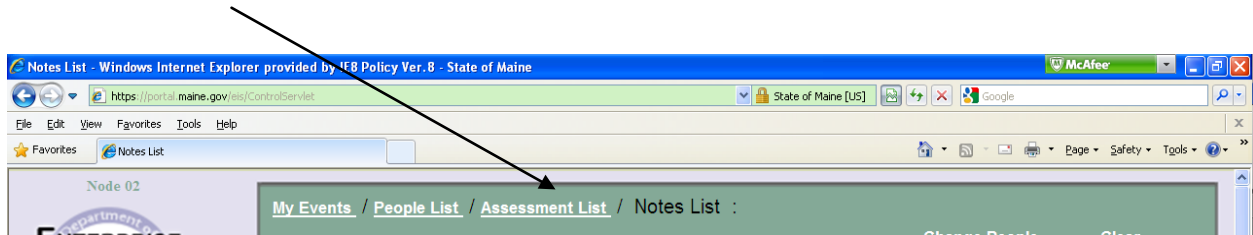
### Note:

The EIS system has a security feature that logs you off the system if you do not use it for 33 minutes.

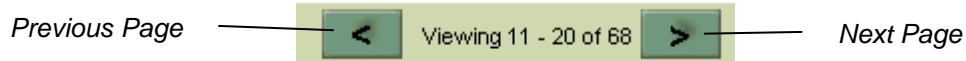
## Navigating in EIS


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At the top of every EIS screen (in the EIS header) is a navigation bar that can be used to go back to previously visited screens. It looks like this (once you have navigated through the system):



In addition, on some list pages, **PREVIOUS PAGE** and **NEXT PAGE** buttons appear at the bottom to aid in navigating through a longer list.



Your **BACK**  and **FORWARD**  buttons in Internet Explorer should **NOT** be used to navigate, because you will lose your history and your changes will not save.

### Note:

To minimize Internet Explorer tools, press the **F11** key on your keyboard. Press **F11** again to bring them back.



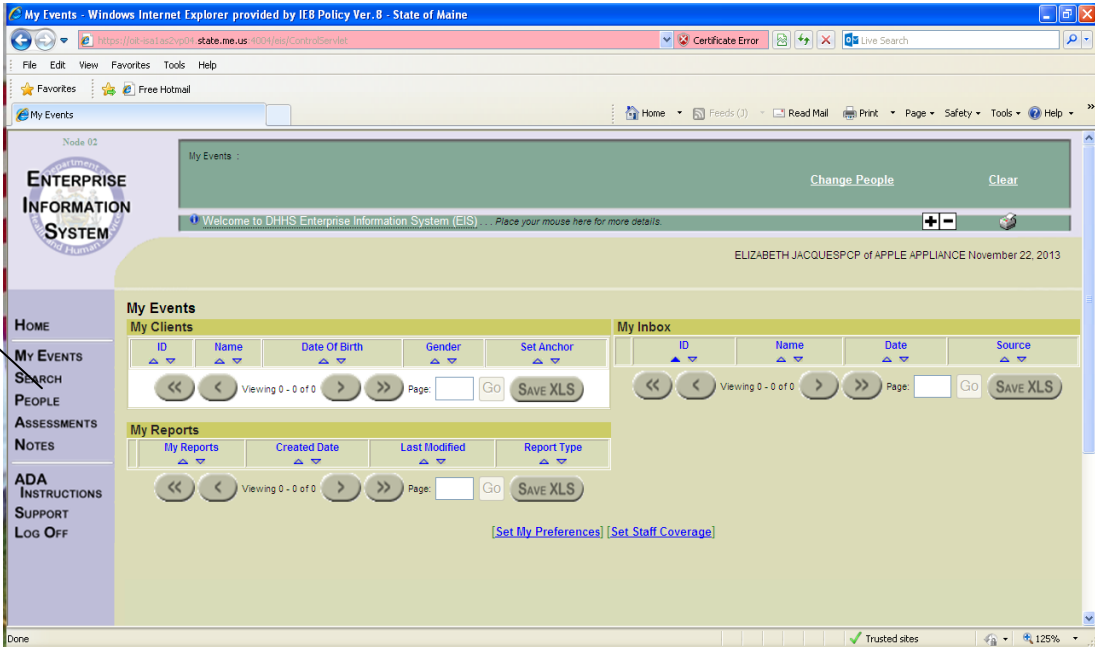
# Locating and Anchoring a Person

There are multiple ways to locate a person within the EIS system,

Locate person through **People** Menu

1. Click on **PEOPLE** in the EIS Menu.

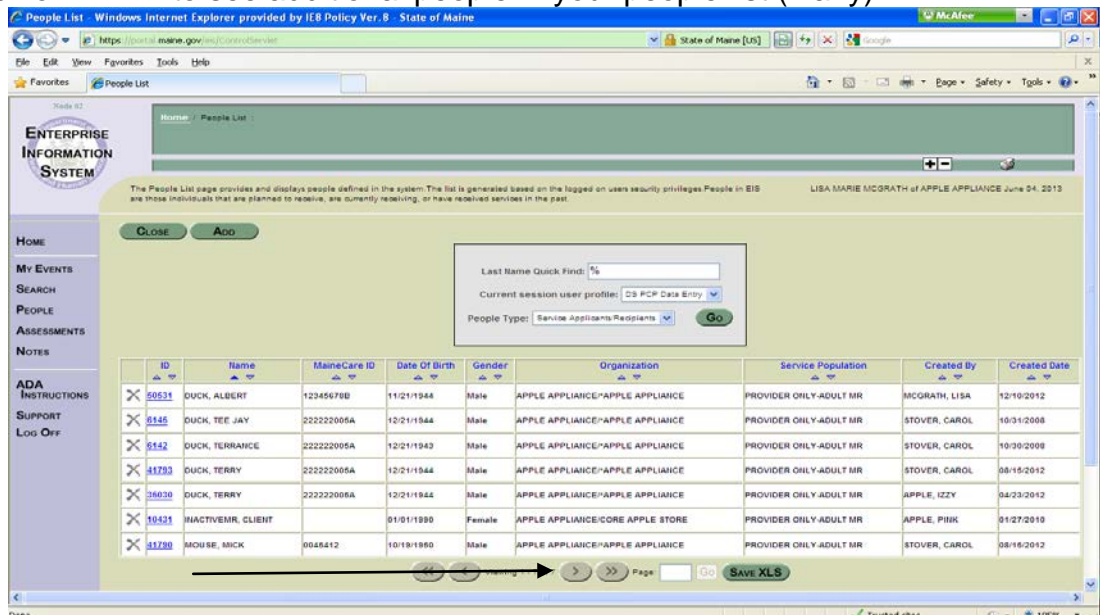
*People* →



The screenshot shows the 'My Events' page in the EIS system. The left sidebar menu includes 'HOME', 'MY EVENTS', 'SEARCH', 'PEOPLE', 'ASSESSMENTS', 'NOTES', 'ADA INSTRUCTIONS', 'SUPPORT', and 'LOG OFF'. The 'PEOPLE' menu item is highlighted. The main content area displays 'My Clients' and 'My Reports' sections, each with a table of data and pagination controls. The 'My Clients' table has columns for ID, Name, Date Of Birth, Gender, and Set Anchor. The 'My Reports' table has columns for My Reports, Created Date, Last Modified, and Report Type. The page also includes a 'Welcome to DHHS Enterprise Information System (EIS)' message and a user profile for ELIZABETH JACQUESPOC.

2. View the *People List* page.

3. Click on **NEXT** to see additional people in your people list (if any).



The screenshot shows the 'People List' page in the EIS system. The left sidebar menu includes 'HOME', 'MY EVENTS', 'SEARCH', 'PEOPLE', 'ASSESSMENTS', 'NOTES', 'ADA INSTRUCTIONS', 'SUPPORT', and 'LOG OFF'. The 'PEOPLE' menu item is highlighted. The main content area displays a search filter for 'Last Name Quick Find' and a table of people. The table has columns for ID, Name, MaineCare ID, Date Of Birth, Gender, Organization, Service Population, Created By, and Created Date. The page also includes a 'Welcome to DHHS Enterprise Information System (EIS)' message and a user profile for LISA MARIE MCGRATH.

ID	Name	MaineCare ID	Date Of Birth	Gender	Organization	Service Population	Created By	Created Date
50531	DUCK, ALBERT	123456789	11/21/1944	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	MCGRATH, LISA	12/10/2012
5145	DUCK, TEE JAY	22222005A	12/21/1944	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	STOVER, CAROL	10/31/2008
5142	DUCK, TERRANCE	22222005A	12/21/1943	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	STOVER, CAROL	10/30/2008
43793	DUCK, TERRY	22222005A	12/21/1944	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	STOVER, CAROL	08/15/2012
56638	DUCK, TERRY	22222006A	12/21/1944	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	APPLE, IZZY	04/23/2012
10425	INACTIVEMR, CLIENT		01/01/1990	Female	APPLE APPLIANCE/CORE APPLE STORE	PROVIDER ONLY-ADULT MR	APPLE, PIHK	01/27/2010
43790	MOUSE, BRICK	0045412	10/18/1950	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	STOVER, CAROL	08/16/2012

- Click on your designated individual's **ID** number (to the left of their name) to **Set Anchor**.

The People List page provides and displays people defined in the system. The list is generated based on the logged on users security privileges People in EIS are those individuals that are planned to receive, are currently receiving, or have received services in the past.

Home / People List

Close Add

Last Name Quick Find: %  
Current session user profile: DS PCP Data Entry  
People Type: Service Applicants Recipients Go

ID	Name	MaineCare ID	Date Of Birth	Gender	Organization	Service Population	Created By	Created Date
50531	DUCK, ALBERT	12345678B	11/21/1944	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	MCGRATH, LISA	12/10/2012
8145	DUCK, TEE JAY	222222005A	12/21/1944	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	STOVER, CAROL	10/31/2008
8142	DUCK, TERRANCE	222222005A	12/21/1943	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	STOVER, CAROL	10/30/2008
41793	DUCK, TERRY	222222005A	12/21/1944	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	STOVER, CAROL	08/15/2012
36030	DUCK, TERRY	222222005A	12/21/1944	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	APPLE, IZZY	04/23/2012
10431	INACTIVE/MR, CLIENT		01/01/1990	Female	APPLE APPLIANCE/CORE APPLE STORE	PROVIDER ONLY-ADULT MR	APPLE, PIHK	01/27/2010
41790	MOUSE, MICK	0045412	10/19/1950	Male	APPLE APPLIANCE/APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	STOVER, CAROL	08/15/2012

Viewing 1 - 7 of 7 Page Go SAVE XLS

Now that the person has been set as an anchor, all navigation through the system is connected directly to that person and lists will be filtered to show only those items directly connected to them.

Name in EIS header indicating that they are anchored

People Demographics - Windows Internet Explorer provided by IE8 Policy Ver.8 - State of Maine

Home: People List / People  
People ID: 50531 | Name: DUCK, ALBERT | Age: 68

Close Save

First Name: ALBERT  
Last Name: DUCK  
Date of Birth: 11/21/1944  
Gender: MALE  
MaineCare ID: 12345678B  
Primary Service Population: PROVIDER ONLY-ADULT MR

### Helpful Hint:

You may also type in the beginning of the individual's last name before the % symbol in **LAST NAME QUICK FIND** and then click the **GO** to find your individual.

The People List page provides and displays people defined in the system. The list is generated based on the logged on user's privileges. People in EIS are those individuals that are planned to receive, are currently receiving, or have received services in the past.

SEARCH: ELIZABETH JACQUES PCP of APPLE APPLIANCE December 09, 2013

Buttons: CLOSE, ADD

Search Box: Last Name Quick Find: %duck

Current session user profile: DS PCP Data Entry

People Type: Service Applicants/Recipients

Go

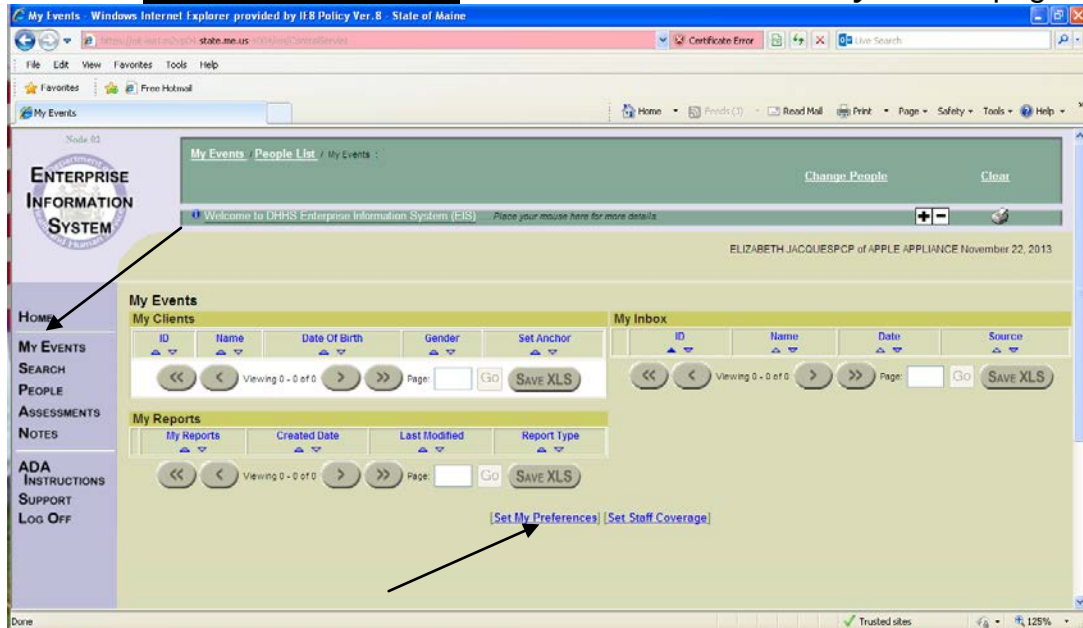
ID	Name	MaineCare ID	Date Of Birth	Gender	Organization	Service Population	Created By	Created Date
56078	BROWN, ANN		12/15/1988	Female	APPLE APPLIANCE*APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	MERRILL, LISA	10/28/2013
50531	DUCK, ALBERT	12345678B	11/21/1944	Male	APPLE APPLIANCE*APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	MERRILL, LISA	12/10/2012
6145	DUCK, TEE JAY	222222005A	12/21/1944	Male	APPLE APPLIANCE*APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	STOVER, CAROL	10/31/2008
6142	DUCK, TERRANCE	222222005A	12/21/1943	Male	APPLE APPLIANCE*APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	STOVER, CAROL	10/30/2008
41793	DUCK, TERRY	222222005A	12/21/1944	Male	APPLE APPLIANCE*APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	STOVER, CAROL	08/15/2012
53654	DUCK, TERRY	222222005A	03/27/1977	Female	APPLE APPLIANCE*APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	HENTON, PAUL	06/11/2013
35030	DUCK, TERRY	222222005A	12/21/1944	Male	APPLE APPLIANCE*APPLE APPLIANCE	PROVIDER ONLY-ADULT MR	APPLE, IZZY	04/23/2012

Remember to Click on your designated individual's **ID** number (to the left of their name) to **Set Anchor** before proceeding to the next step.

Locate person from My Clients List in My Events Menu

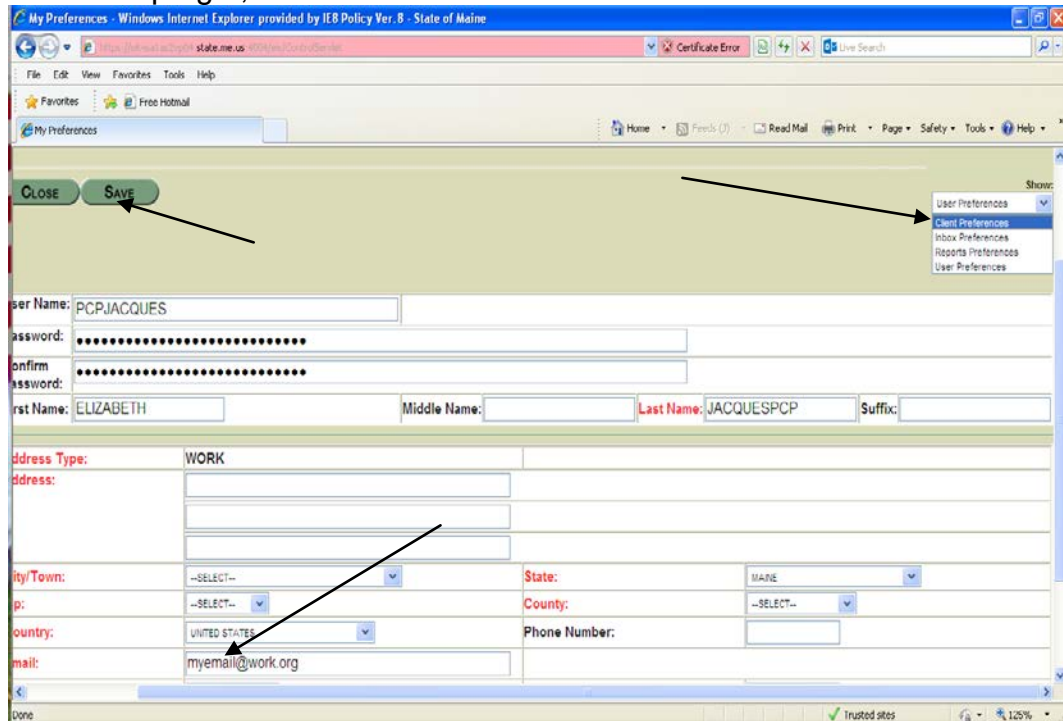
Add Client to **My Clients** in **MY EVENTS** page

1. Click on **(Set My Preferences)** located bottom middle of **My Events** page.

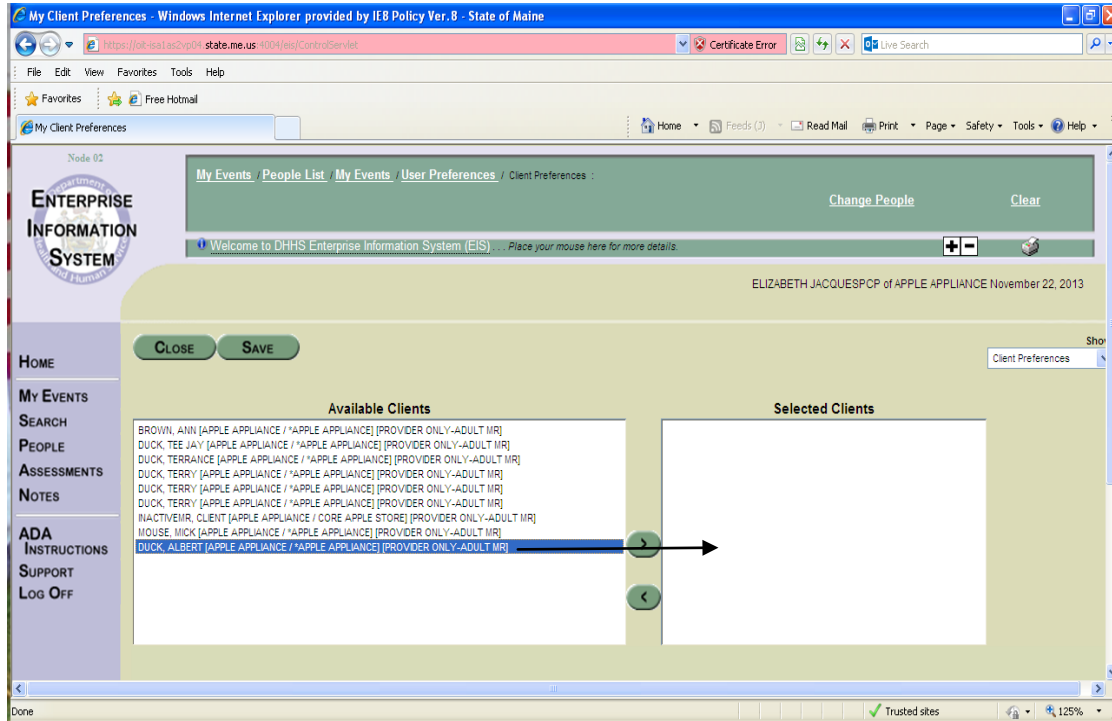


2. Add your e-mail address to profile page, **SAVE**.

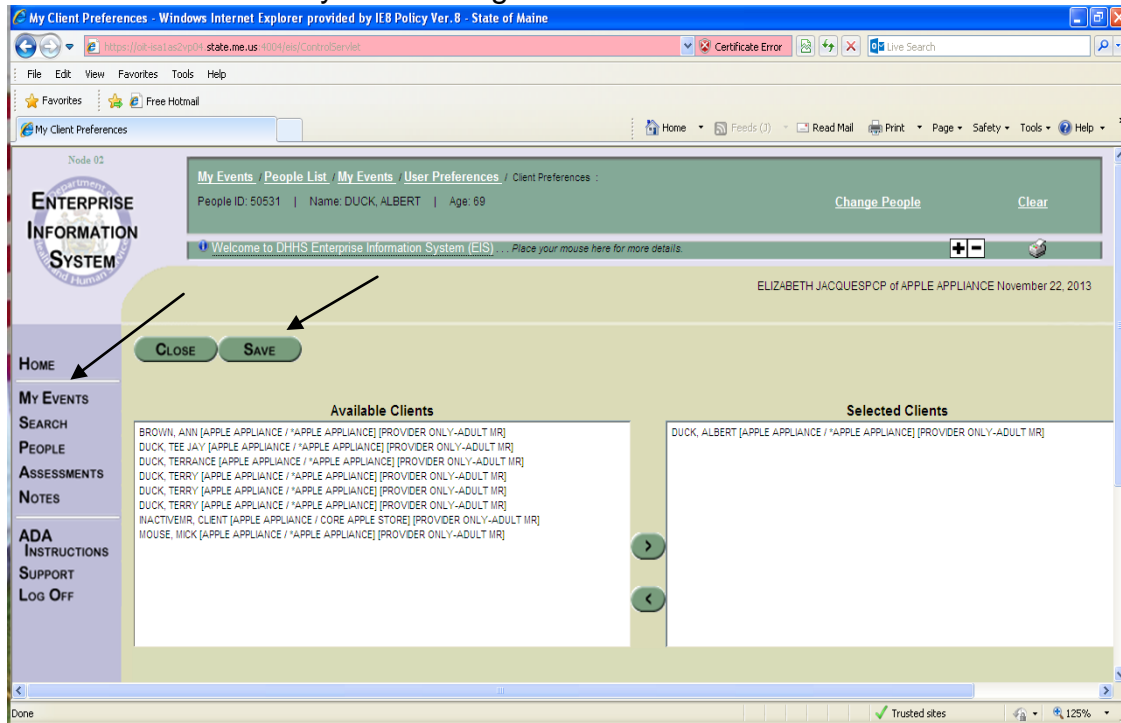
3. Scroll to top right, CLICK show menu and select **Client Preferences**.



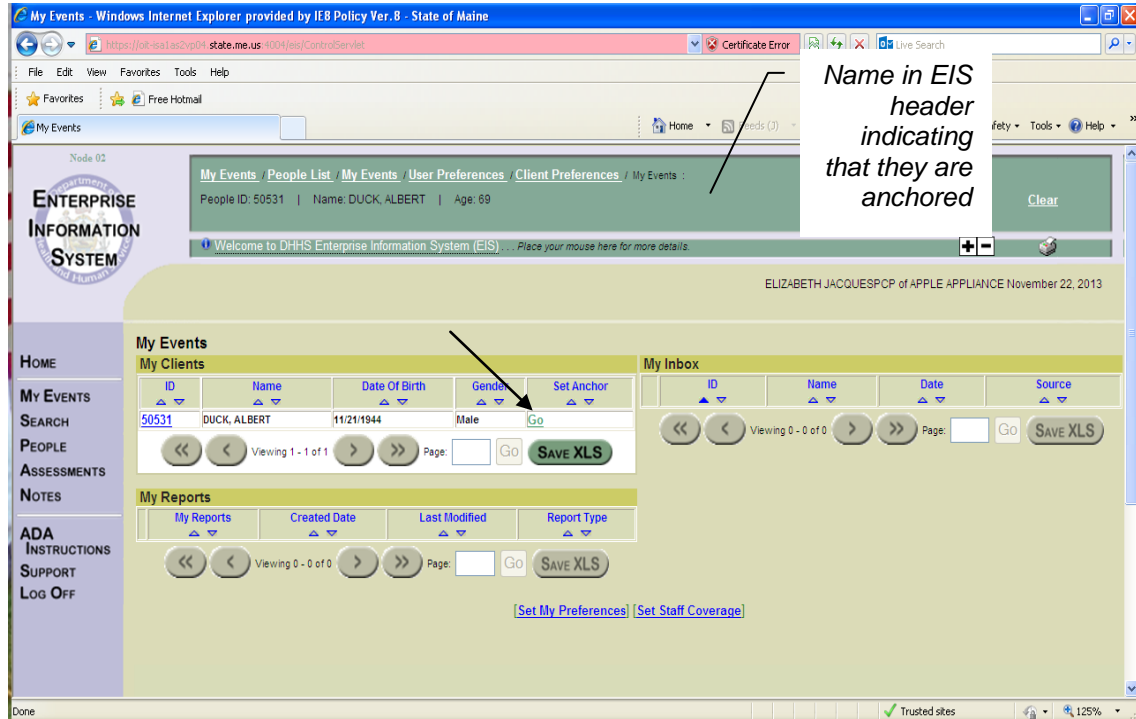
- Click on *clients name* in **Available Clients** list, Click > button to move client to the **Selected Clients** box.



- SAVE** and return to My Events Page.



6. Click on your designated individual's **GO** (to the right of their name) to **Set Anchor**.



Now that the person has been set as an anchor, all navigation through the system is connected directly to that person and lists will be filtered to show only those items directly connected to them.

**Helpful Hint:**

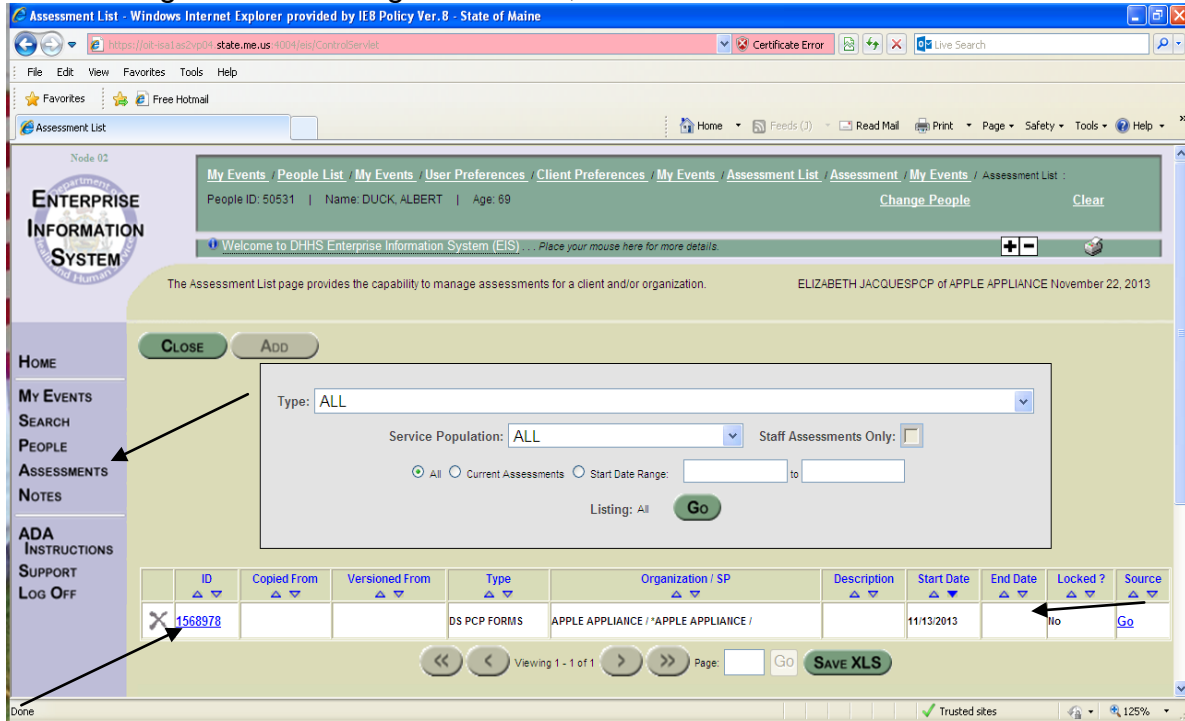
If you press the **CTRL** key on your keyboard and use your scroll ball on your mouse, you can make the text on the screen larger or smaller.

**Helpful Hint:**

Clicking on **HOME**, **PEOPLE**, **MY EVENTS**, or logging off the EIS system will clear the anchor point .

# Accessing and Updating an Open PCP Assessment

1. After setting anchor to designated client, select **Assessments** from EIS Menu.



This brings you to the *assessment list* page. (\*\***NOTE**\*\**Providers will not see the Open Assessment until the Case Manager enters an initial PCP assessment.*) Case Manager's see page 16 to "Open an initial PCP Assessment".

2. You will notice that you now have a **DS PCP FORM** listed for the client that you anchored on.
3. Click on the **ID** number corresponding to the Open Assessment (No End Date) **DS PCP FORMS**.
4. The system will bring you to the *Assessment General* page.



- In order to access the PCP information, click on the **Show** menu located on the right hand side of the **General Assessments** screen, and then click on **Questionnaire**.

You will then be brought to the first **Dimension** of the **PCP Assessment, Personal Plan Face Sheet**.



Assessments are made up of several Dimensions. The PCP Assessment also has many dimensions in order to capture all of the information related to the PCP.

In order to access the specific dimensions, click on the drop down titled **Dimensions** in the middle of the page.

**(\*\*NOTE\*\* Remember to click the Save button before moving on to another Dimension):**

Assessment Questionnaire - Windows Internet Explorer provided by IE8 Policy Ver. 8 - State of Maine

https://ok-qaas1vp04.state.me.us:1004/eis/ControlServlet

File Edit View Favorites Tools Help

Assessment Questionnaire

Node 01

ENTERPRISE INFORMATION SYSTEM

My Events / Assessment List / Assessment :

People ID: 50531 | Name: DUCK, ALBERT | Age: 69  
Organization/Location ID: 28405/37523 | Name: APPLE APPLIANCE / \*APPLE APPLIANCE

Welcome to DHHS Enterprise Information System (EIS) ... Place your mouse here for more details.

The Assessment Questionnaire page provides the capability to conduct the actual assessment and to view the instrument. ELIZABETH JACQUESPCP of APPLE APPLIANCE November 22, 2013

CLOSE SAVE

Assessment: DS PCP FORMS

Dimension:

Personal Plan Face Sheet

Personal Plan Face Sheet

Personal Plan Narrative

Home Supports - MaineCare Serv Description Form

Home Support Goals Description Sheet

1. Work/Employment Supports - MaineCare Serv Description Form

1. Work/Employment Supports Goals Description Sheet

2. Work/Employment Supports - MaineCare Serv Description Form

2. Work/Employment Supports Goals Description Sheet

Case Management - MaineCare Serv Description Form

Case Management Goal Description Sheet

1. Community Supports - MaineCare Serv Description Form

1. Community Supports Goals Description Sheet

2. Community Supports - MaineCare Serv Description Form

2. Community Supports Goals Description Sheet

3. Community Supports - MaineCare Serv Description Form

3. Community Supports Goals Description Sheet

Ancillary Supports - MaineCare Serv Description Form

Final Case Management Approval

Domain (s)

Dimension Description

Effective Plan Date

Funding Type

--Select--

Questionnaire

Done

Trusted sites

125%

# CASE MANAGERS ONLY

## Adding an Initial PCP Assessment –

1. Once anchored on client, click on **Assessments**.

People Demographics - Windows Internet Explorer provided by IEB Policy Ver. 8 - State of Maine

https://portal.maine.gov/eis/Contraband

Enterprise Information System

My Events / People List / People

People ID: 50531 | Name: DUCK, ALBERT | Age: 68

LISA MARIE MCCORATH of APPLE APPLIANCE June 04, 2013

HOME

MY EVENTS

SEARCH

PEOPLE

ASSESSMENTS

NOTES

ADA INSTRUCTIONS

SUPPORT

LOG OFF

CLOSE SAVE

First Name: ALBERT

Last Name: DUCK

Date of Birth: 11/21/1944

Gender: MALE

MaineCare ID: 12345678B

Primary Service Population: PROVIDER ONLY-ADULT MA

This will bring you to the **Assessment List** page. If you are entering an initial PCP Assessment, this page will not list any Assessments for view.

Assessment List - Windows Internet Explorer provided by IEB Policy Ver. 8 - State of Maine

https://portal.maine.gov/eis/Contraband

Enterprise Information System

My Events / People List / People / Assessment List

People ID: 10431 | Name: INACTIVE MR. CLIENT | Age: 23

Change People Clear

Welcome to EIS Enterprise Information System (EIS) - Place your mouse here for more details

The Assessment List page provides the capability to manage assessments for a client and/or organization.

ELIZABETH JACQUESPCP of APPLE APPLIANCE December 09, 2013

CLOSE ADD

Type: ALL

Service Population: ALL

Staff Assessments Only: ☐

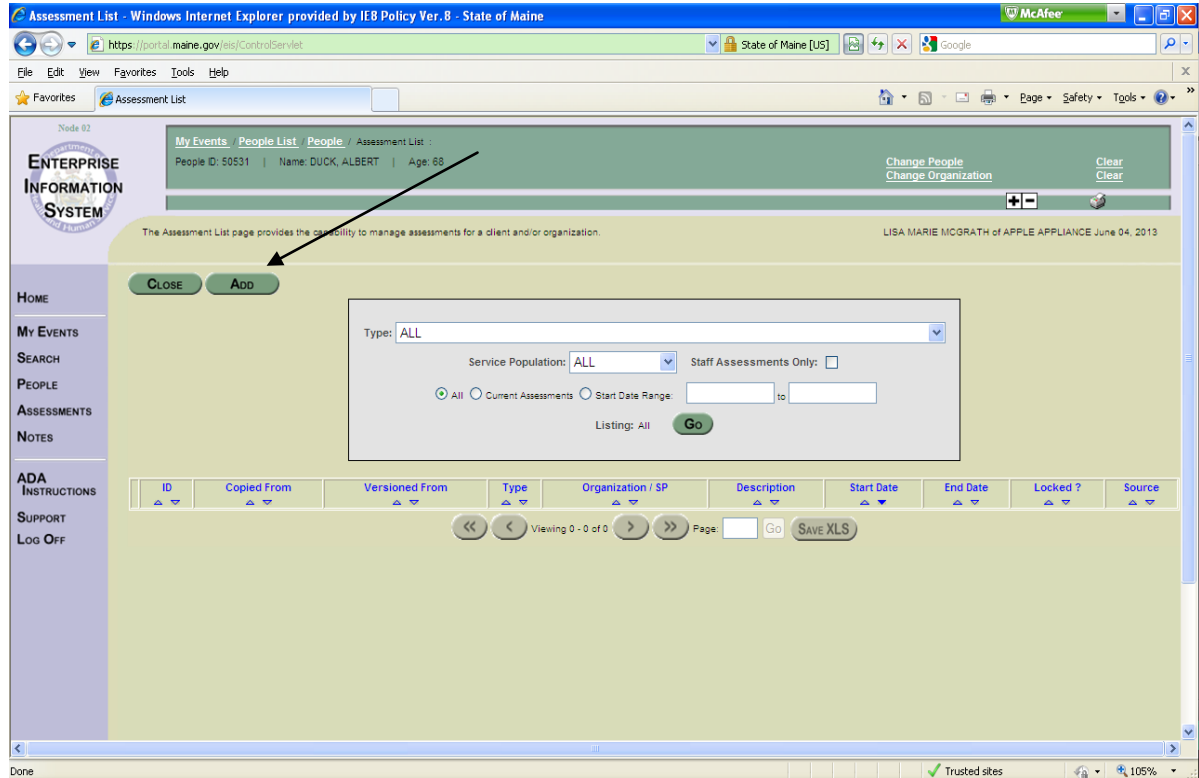
As ☐ Current Assessments ☐ Start Date Range: to

Listing: All Go

ID	Copied From	Versioned From	Type	Organization / SP	Description	Start Date	End Date	Locked ?	Source
----	-------------	----------------	------	-------------------	-------------	------------	----------	----------	--------

Viewing 0 - 0 of 0 Page: Go SAVE XLS

2. To create an Initial **PCP Assessment**, click the **Add** button.



You will receive a screen asking for the Start Date of the Assessment. The system Autofills the clients name and the Organization that you, the user, is assigned to.

3. Please enter the **Start Date** to reflect the date of opening the assessment. Click the **Next** button.

The screenshot shows the 'Add Assessment Step1' page. The page displays a form with fields for Start Date, End Date, Person, and Organization. The Start Date is set to 06/04/2013, and the Person is DUCK, ALBERT. The Organization is APPLE APPLIANCE / \*APPLE APPLIANCE. The 'Next' button is highlighted with an arrow.

4. Click on the **Instrument Type: DS PCP Forms (Version 1)**
5. Click **Finish**

https://portal.maine.gov/ - Add Assessment Step2 - Windows Internet Explorer provided by McAfee

Select the instrument type and press Finish button to add the assessment.

Instrument Type: DS PCP FORMS (Version 1)

PREVIOUS FINISH CANCEL

Trusted sites 105%

After clicking the Finish button, the system will bring you to the **Assessment General** page.

Assessment General - Windows Internet Explorer provided by IE8 Policy Ver. 8 - State of Maine

https://portal.maine.gov/eis/ControlServlet

State of Maine [US] Google

File Edit View Favorites Tools Help

Assessment General

Node 62

ENTERPRISE INFORMATION SYSTEM

My Events / People List / People / Assessment List / Assessment :

People ID: 50531 | Name: DUCK, ALBERT | Age: 68  
Organization/Location ID: 28405/37523 | Name: APPLE APPLIANCE / \*APPLE APPLIANCE

The Assessment General page provides the capability to manage assessments. LISA MARIE MCGRATH of APPLE APPLIANCE June 04, 2013

CLOSE SAVE COPY SCORE NEW VERSION LINK TO PROCESS COMPLETE UNANSWERED QUESTIONS

Type: DS PCP FORMS (Version 1)

Start Date: 09/04/2013 End Date:

Performed By: LISA MARIE MCGRATH X Date of first Assessment: 09/21/2012

Client Refuses to take Assessment: ☐ Date of first Assessment at this Organization: 06/04/2013

Baseline: ☐ Locked: ☐

Description:

Score Results:

Item	Result

Score Summary:

Viewing 0 - 0 of 0 Page: Go SAVE XLS

Done Trusted sites 105%

- In order to access the PCP information, click on the **Show** menu located on the right hand side of the screen, and then click on **Questionnaire**.

Assessment General - Windows Internet Explorer provided by IEB Policy Ver. 8 - State of Maine

https://portal.maine.gov/eis/ControlServlet

State of Maine [US]

McAfee

File Edit View Favorites Tools Help

Assessment General

Node 02

Enterprise Information System

My Events / People List / People / Assessment List / Assessment

People ID: 50531 | Name: DUCK, ALBERT | Age: 68  
Organization/Location ID: 28405/37523 | Name: APPLE APPLIANCE / \*APPLE APPLIANCE

The Assessment General page provides the capability to manage assessments.

LISA MARIE MCGRATH of APPLE APPLIANCE June 04, 2013

CLOSE SAVE COPY SCORE NEW VERSION LINK TO PROCESS COMPLETE UNANSWERED QUESTIONS

Type: DS PCP FORMS (Version 1)

Start Date: 06/04/2013 End Date:

Performed By: LISA MARIE MCGRATH Date of first Assessment: 09/21/2012

Client Refuses to take Assessment: ☐ Date of first Assessment at this Organization: 06/04/2013

Baseline: ☐ Locked: ☐

Description:

Score Results:

Item Result

Viewing 0 - 0 of 0 Page Go SAVE XLS

Score Summary:

Done

Trusted sites

105%

You will then be brought to the first **Dimension** of the PCP Assessment, **Personal Plan Face Sheet**.

Assessment Questionnaire - Windows Internet Explorer provided by IEB Policy Ver. 8 - State of Maine

https://portal.maine.gov/eis/ControlServlet

State of Maine [US]

McAfee

File Edit View Favorites Tools Help

Assessment Questionnaire

Node 02

Enterprise Information System

My Events / People List / People / Assessment List / Assessment

People ID: 50531 | Name: DUCK, ALBERT | Age: 68  
Organization/Location ID: 28405/37523 | Name: APPLE APPLIANCE / \*APPLE APPLIANCE

The Assessment Questionnaire page provides the capability to conduct the actual assessment and to view the instrument.

LISA MARIE MCGRATH of APPLE APPLIANCE June 04, 2013

CLOSE SAVE

Assessment: DS PCP FORMS

Dimension: Personal Plan Face Sheet

Domain (s)

Dimension Description

Effective Plan Date Plan End Date

Funding Type --Select--

Caseworker Name & Agency

Plan Coordinator Agency Plan Coordinator Name

Name of Guardian(s), if applicable

Done

Trusted sites

105%

Assessments are made up of several Dimensions. The *PCP Assessment* also has many dimensions in order to capture all of the information related to the PCP.

7. In order to access the specific dimensions, click on the drop down titled ***Dimensions*** in the middle of the page.

**(\*\*NOTE\*\* Remember to click the Save button before moving on to another Dimension):**

**\*\*IMPORTANT:** Once all portions of the PCP Assessment have been completed and approved by the Case Manager and/or Case Manager Supervisor, please be sure to check the **lock check box** on the **Assessment General page**. This is crucial to ensuring that once finalized, the data contained in the Assessment is not altered. See page 25 Lock Completed PCP Assessment)\*\*\*

# ***CASE MANAGERS ONLY***

**Create a new version for PCP changes,  
addendums and new annual PCP date**

## **Create a NEW VERSION from a Completed PCP Assessment**

1. Follow the instructions on page 7 *anchoring on a client*.
2. After anchoring on your client, click on **Assessments** in the left hand menu.

The screenshot shows a web browser window with the URL <https://portal.maine.gov/eis/ControlServlet>. The page title is "People Demographics - Windows Internet Explorer provided by IEB Policy Ver. 8 - State of Maine". The browser's address bar shows the URL. The page content includes a sidebar menu on the left with the following items: HOME, MY EVENTS, SEARCH, PEOPLE, ASSESSMENTS (highlighted with a black arrow), NOTES, ADA INSTRUCTIONS, SUPPORT, and LOG OFF. The main content area displays the "Enterprise Information System" logo and a header section with the text "My Events / People List / People :". Below this, the client information is shown: "People ID: 50531 | Name: DUCK, ALBERT | Age: 68". The main content area contains a form with the following fields: "First Name:" (ALBERT), "Last Name:" (DUCK), "Date of Birth:" (11/21/1944), "Gender:" (MALE), "MaineCare ID:" (12345678B), and "Primary Service Population:" (PROVIDER ONLY-ADULT MR). The form also includes "CLOSE" and "SAVE" buttons. The status bar at the bottom of the browser window shows "Done" and "Trusted sites".



- You will notice that you now have a DS PCP Assessment listed for the client that you anchored on.

Assessment List - Windows Internet Explorer provided by IE8 Policy Ver. 8 - State of Maine

https://portal.maine.gov/eis/ControlServlet

State of Maine [US]

McAfee

File Edit View Favorites Tools Help

Assessment List

Node 02

My Events / People List / People / Assessment List

People ID: 50531 | Name: DUCK, ALBERT | Age: 68

Change People Change Organization Clear Clear

The Assessment List page provides the capability to manage assessments for a client and/or organization.

LISA MARE MCGRATH of APPLE APPLIANCE June 04, 2013

CLOSE ADD

Type: ALL

Service Population: ALL Staff Assessments Only: ☐

☒ All ☐ Current Assessments ☐ Start Date Range: to

Listing: All Go

ID	Copied From	Versioned From	Type	Organization / SP	Description	Start Date	End Date	Locked ?	Source
<a href="#">1475185</a>			DS PCP FORMS	APPLE APPLIANCE / *APPLE APPLIANCE / ADULT MR		06/04/2013		No	Go

Viewing 1 - 1 of 1 Page: Go SAVE XLS

Done

Trusted sites 120%

- To update the *PCP Assessment*, click on the **ID** # to the current (No End Date) **DS PCP FORMS** Assessment.
- This will bring you to the **Assessment General** page.

Assessment General - Windows Internet Explorer provided by IE8 Policy Ver. 8 - State of Maine

https://portal.maine.gov/eis/ControlServlet

State of Maine [US]

McAfee

File Edit View Favorites Tools Help

Assessment General

Node 03

My Events / People List / People / Assessment List / Assessment

People ID: 50531 | Name: DUCK, ALBERT | Age: 68

Organization/Location ID: 20405/37523 | Name: APPLE APPLIANCE / \*APPLE APPLIANCE

The Assessment General page provides the capability to manage assessments.

LISA MARE MCGRATH of APPLE APPLIANCE June 04, 2013

CLOSE SAVE COPY SCORE NEW VERSION LINK TO PROCESS COMPLETE UNANSWERED QUESTIONS

Type: DS PCP FORMS (Version 1)

Start Date: 06/04/2013 End Date:

Performed By: LISA MARE MCGRATH Date of first Assessment: 09/21/2012

Client Refuses to take Assessment: ☐ Date of first Assessment at this Organization: 06/04/2013

Baseline: ☐ Locked: ☐

Description:

Score Results:

Item Result

Viewing 0 - 0 of 0 Page: Go SAVE XLS

Score Summary:

Trusted sites 120%



6. To create a workable copy of the Assessment, click on the **New Version** button:

Assessment General - Windows Internet Explorer provided by IE8 Policy Ver.8 - State of Maine

https://portal.maine.gov/eis/ControlServlet

File Edit View Favorites Tools Help

Assessment General

Node 02

ENTERPRISE INFORMATION SYSTEM

My Events / People List / People / Assessment List / Assessment :

People ID: 50531 | Name: DUCK, ALBERT | Age: 68  
Organization/Location ID: 28405/37523 | Name: APPLE APPLIANCE / \*APPLE APPLIANCE

The Assessment General page provides the capability to manage assessments. LISA MARIE MCGRATH of APPLE APPLIANCE June 04, 2013

CLOSE SAVE COPY SCORE **NEW VERSION** LINK TO PROCESS COMPLETE UNANSWERED QUESTIONS

Type: DS PCP FORMS (Version 1)  
Start Date: 06/04/2013 End Date:  
Performed By: LISA MARIE MCGRATH  
Client Refuses to take Assessment: ☐  
Baseline: ☐  
Date of first Assessment: 09/21/2012  
Date of first Assessment at this Organization: 06/04/2013  
Locked: ☐  
Description:

Score Results:

Item Result

Viewing 0 - 0 of 0 Page: Go SAVE XLS

Score Summary:

7. A screen will appear that already auto fills the **Organization** of you the User.
8. You will need to enter a **Start Date** for this New Version of the PCP. Leave the **End Date** blank, click the **OK** button.

https://portal.maine.gov/ - Create New Assessment Version - Window McAfee

Enter the information about the new Assessment and press OK.

Organization: APPLE APPLIANCE / \*APPLE APPLIANCE

Start Date: 06/06/2013

End Date:

Related Calendar Item: None

OK CANCEL

Trusted sites 120%

Your screen will refresh and bring you to the **Assessment General** page. This is now a workable document for you to make any necessary changes. By Creating a New Version of the current PCP Forms, the EIS copies all of the entered data in the Questionnaire into a workable document allowing the user to just make necessary changes.

9. Click on the **Show** menu, go to **Questionnaire**.

10. Make any necessary changes in any of the dimensions.

**\*\*NOTE\*\* Remember to save your changes before switching to a new dimension.**

**\*\*IMPORTANT:** Once all portions of the PCP Assessment have been completed and approved by the Case Manager and/or Case Manager Supervisor, please be sure to check the **lock check box** on the **Assessment General page**. This is crucial to ensuring that once finalized, the data contained in the Assessment is not altered. See page 25 Lock Completed PCP Assessment)\*\*\*

# **CASE MANAGERS ONLY**

## **Lock Completed PCP Assessment**

Once all portions of the PCP Assessment have been completed and approved by the Case Manager and/or Case Manager Supervisor, please be sure to check the lock check box on the Assessment General page. This is crucial to ensuring that once finalized, the data contained in the Assessment is not altered.

1. Open the **DS PCP Form** (no end date) for the client that you have completed and approved the PCP Assessment for.
2. Click **Locked** box.
3. Click **OK** to message box.
4. Click **SAVE**

The screenshot displays the 'Assessment General' page in the DHHS Enterprise Information System (EIS). The page header shows the user is logged in as 'ELIZABETH JACQUESPCP of APPLE APPLIANCE' on December 18, 2013. The assessment details for 'DUCK, ALBERT' (ID: 50531) are shown, including the start date (11/13/2013) and the performer (CASEMANAGER APPLE). The 'Locked' checkbox is checked, and a red message indicates that the assessment is locked exclusively to the user. The 'SAVE' button is highlighted with a black arrow. The page also includes a 'Score Results' section and a 'Score Summary' section.

Type:	DS PCP FORMS (Version 1)
Start Date:	11/13/2013
End Date:	
Performed By:	CASEMANAGER APPLE
Date of First Assessment:	11/13/2013
Client Refuses to Take Assessment:	<input type="checkbox"/>
Date of First Assessment at this Organization:	11/13/2013
Baseline:	<input type="checkbox"/>
Locked:	<input checked="" type="checkbox"/> You have locked this assessment exclusively to yourself.
Description:	Annual PCP approved and complete

Score Results:

Item	Result
------	--------

Score Summary:

# CASE MANAGERS ONLY

## Attaching the DS Plan Review Note

The **DS Plan Review Note** is a note specific to the annual PCP, and is a place to document quarterly and semi-annual PCP reviews. This note is **attached** to the **DS PCP Assessment**.

### NOTE:

If changes/modifications are done to the Plan then the Assessment needs to be Re-versioned and changes made (see pg. 21)

1. Follow instructions on page 7 to *anchor a client*.
2. Click on **Assessments** on left hand menu.

The screenshot shows a web browser window displaying the 'Enterprise Information System' (EIS) interface. The browser's address bar shows the URL 'https://portal.maine.gov/eis/controlServlet'. The page title is 'People Demographics - Windows Internet Explorer provided by IEB Policy Ver. 8 - State of Maine'. The main content area displays the 'My Events / People List / People' section for a client with ID 50531, Name DUCK, ALBERT, and Age 68. The client's name is highlighted in green. Below the client information, there are buttons for 'CLOSE' and 'SAVE'. The left sidebar contains a navigation menu with options: HOME, MY EVENTS, SEARCH, PEOPLE, ASSESSMENTS, NOTES, ADA INSTRUCTIONS, SUPPORT, and LOG OFF. The 'ASSESSMENTS' option is highlighted. The main content area shows a form for entering assessment data. The form fields are: First Name: ALBERT, Last Name: DUCK, Date of Birth: 11/21/1944, Gender: MALE (dropdown), MaineCare ID: 12345678B, and Primary Service Population: PROVIDER ONLY-ADULT MR (dropdown). A black arrow points from the 'ASSESSMENTS' menu item to the 'First Name' field.

Field	Value
First Name	ALBERT
Last Name	DUCK
Date of Birth	11/21/1944
Gender	MALE
MaineCare ID	12345678B
Primary Service Population	PROVIDER ONLY-ADULT MR

3. Click on the **Assessment ID #** of the current **DS PCP Forms Assessment**.

The screenshot shows the 'Assessment List' page in the Enterprise Information System. The page header includes 'My Events / People List / People / Assessment List' and 'People ID: 50531 | Name: DUCK, ALBERT | Age: 68'. The main content area displays a table of assessments. The first row is highlighted, and an arrow points to the ID '1475185'. The table columns are: ID, Copied From, Versioned From, Type, Organization / SP, Description, Start Date, End Date, Locked?, and Source. The first row contains the following data: ID: 1475185, Type: DS PCP FORMS, Organization / SP: APPLE APPLIANCE / APPLE APPLIANCE / ADULT MR, Start Date: 06/04/2013, End Date: , Locked?: No, Source: Go.

4. Click on the **Show** menu and select **Notes** from the DS PCP FORMS Assessments.

The screenshot shows the 'Assessment General' page in the Enterprise Information System. The page header includes 'My Events / People / Assessment List / Assessment' and 'People ID: 50531 | Name: DUCK, ALBERT | Age: 69 | Organization/Location ID: 28405/37523 | Name: APPLE APPLIANCE / \*APPLE APPLIANCE'. The main content area displays a form for the assessment 'DS PCP FORMS (Version 1)'. The 'Show' menu is open, and 'Notes' is selected. The form fields are: Type: DS PCP FORMS (Version 1), Start Date: 11/13/2013, End Date: , Performed By: CASEMANAGER APPLE, Date of First Assessment: 11/13/2013, Client Refuses to Take Assessment: , Date of First Assessment at this Organization: 11/13/2013, Baseline: , Locked: , Description: . The 'Score Results' section is also visible at the bottom.

5. This will bring you to the **Notes List** page and will connect this Note to the PCP Assessment. Click the **Add** button.

Notes List - Windows Internet Explorer provided by IE8 Policy Ver.8 - State of Maine

https://portal.maine.gov/eis/ControlServlet

State of Maine [US]

File Edit View Favorites Tools Help

Node 01

ENTERPRISE INFORMATION SYSTEM

My Events / Assessment List / Assessment / Notes List :

People ID: 50531 | Name: DUCK, ALBERT | Age: 68  
Organization/Location ID: 28405/37523 | Name: APPLE APPLIANCE / \*APPLE APPLIANCE

The Notes List page provides the capability to manage notes for a person, provider, or both. Notes are generic to the MCGRATH of APPLE APPLIANCE June 19, 2013 may be attached to many areas. In addition, Notes can stand-alone. Notes can be linked to people and/or providers.

CLOSE ADD

Assessment: DS PCP FORMS(1)

Type: All

Group: All

All Current Date Range to

Show Cancelled Notes

Go

Listing: All

ID	Title	Start Date	End Date	Created By	Organization / SP	Last Updated	Type	Cancelled	Source
----	-------	------------	----------	------------	-------------------	--------------	------	-----------	--------

<< < Viewing 0 - 0 of 0 > >> Page: Go SAVE XLS

6. Please provide a **brief title** of the **Note** (\*\*Note\*\* please do not use clients name or initials in the **Title**).
7. Enter a **Start Date** (should be the date of the meeting) and an **End Date** (Most generally the same as the start date). Click the **Next** button.

https://portal.maine.gov/ - Add Note - Windows Internet Explorer provided by IE8 Policy Ver.8 - State of Maine

Enter the Note information below and press the Next button.

Title: Team meeting

Start Date: 06/19/2013

End Date: 06/19/2013

Originator: LISA MARIE MCGRATH

Person: ALBERT --EISPROD-- DUCK

Organization: APPLE APPLIANCE / \*APPLE APPLIANCE

NEXT CANCEL

8. Click on the **DS Plan Review Note (Ver1)**; Click **Finish**.

https://portal.maine.gov/ - Add Note - Windows Internet Explorer provided by IE8 Policy Ver. 8 - State of Maine

You are about to add a Note. Please review the information and press the Finish button to add the Note.

Title: Team meeting  
Start Date: 06/19/2013  
End Date: 06/19/2013  
Originator: LISA MARIE MCGRATH  
Person: ALBERT --EISPROD-- DUCK  
Organization: APPLE APPLIANCE / \*APPLE APPLIANCE  
Type: DS Plan Review Note(Ver 1)

PREVIOUS FINISH

9. Fill out the **Note** with information from the meeting. Please remember to Click on the **Save** button often, as this is a lengthy document. (\*\*Note\*\* Notes are open for editing for 24 hours.

Notes General - Windows Internet Explorer provided by IE8 Policy Ver. 8 - State of Maine

https://portal.maine.gov/eis/ControlServlet

State of Maine [US]

File Edit View Favorites Tools Help

Node 01

My Events / Assessment List / Assessment / Notes List / Notes General :

People ID: 50531 | Name: DUCK, ALBERT | Age: 68  
Organization/Location ID: 28405/37523 | Name: APPLE APPLIANCE / \*APPLE APPLIANCE

The Notes General page provides the capability to add, read, or update notes. Notes are actually never updated. LISA MARIE MCGRATH of APPLE APPLIANCE June 19, 2013 additional note descriptions can be added.

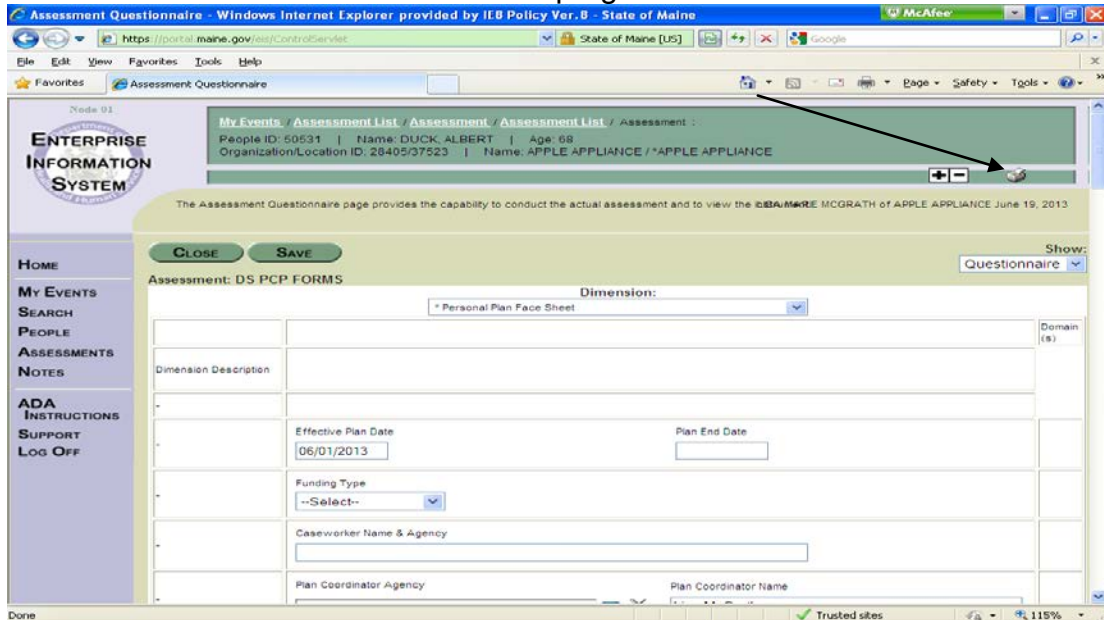
CLOSE SAVE ADD DESCRIPTION CANCEL NOTE ADD SERVICE NOTE

Title: Team meeting Type: DS Plan Review Note(Version1)  
Start Date: 06/19/2013 End Date: 06/19/2013  
Originator: LISA MARIE MCGRATH  
Domains: Available Domain(s) Selected Domain(s)  
ADAPTIVE EQUIPMENT  
COMMUNICATION  
CRISIS  
DAY EVENING SERVICES  
DENTAL  
Source: DS PCP FORMS(1)  
Description: 4000 characters remaining  
Staff Person: LISA MARIE MCGRATH Organization: APPLE APPLIANCE

## Printing the DS PCP Form

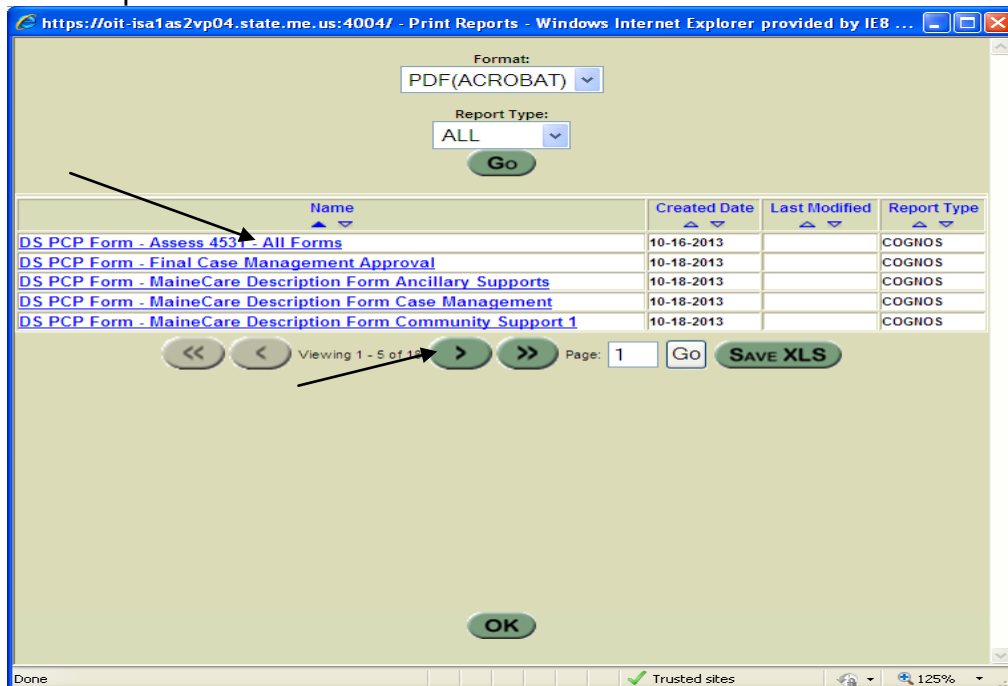
To **Print** the **PCP Form**, from the **Questionnaire** dimensions of the **Assessment**,

1. Click on the **Printer icon**  in the top right hand corner.



A window will open that will list available reports.

2. Click on the **Report** that you would like to run. Use the > button to view more available reports.



Name	Created Date	Last Modified	Report Type
<a href="#">DS PCP Form - Assess 4531 - All Forms</a>	10-16-2013		COGNOS
<a href="#">DS PCP Form - Final Case Management Approval</a>	10-18-2013		COGNOS
<a href="#">DS PCP Form - MaineCare Description Form Ancillary Supports</a>	10-18-2013		COGNOS
<a href="#">DS PCP Form - MaineCare Description Form Case Management</a>	10-18-2013		COGNOS
<a href="#">DS PCP Form - MaineCare Description Form Community Support 1</a>	10-18-2013		COGNOS



The **DS PCP Form-Assess 4531-All Forms** will bring all of the information entered in the Assessment into a PDF format that will allow you to print the entire assessment. Additional print friendly Reports are listed for individual Dementions.

**DS+PCP+Form+Assess+4531+All+Forms[1].pdf - Adobe Reader**

File Edit View Document Tools Window Help

1 / 18 102% Find

**OADS Personal Plan Face Sheet**

Consumer Name: No Data Available EIS ID # No Data Available

Effective Plan Date: Plan End Date:

Funding Type:

Next Waiver Reclassification Date:

Caseworker Name & Agency:

Plan Coordinator Name & Agency:

Name of Guardian(s), if applicable:

Name of Correspondent, if applicable:

List names and affiliations/relationships of other team members who participated in planning:

Name of Medical/Dental Monitor

Name of Rep Payee

Name of Person reporting Critical Information to Case Manager at least monthly or as changes occur.

Name of Advocate:

Notified of meeting? Invited to meeting?

**Items in box require further detail be written in narrative:**

Participated in the planning process:

Type of Guardianship (if applicable)

Does team recommend any changes to guardianship?

Reportable Events in last 12 months?

## Assistance with EIS

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If you need assistance with EIS, please contact **Lisa Merrill**.

- (207) 493-4121
- [Lisa.Merrill@maine.gov](mailto:Lisa.Merrill@maine.gov)

If you are unable to reach Lisa, you can also contact your local IDS (Incident Data Specialist) within your District for EIS technical assistance.

### **District 1 & 2 (York & Cumberland)**

**Paul Henton**

- (207) 822-0155
- [Paul.Henton@maine.gov](mailto:Paul.Henton@maine.gov)

### **District 3 (Western Maine, Franklin, Oxford, Androscoggin)**

**Bruce Russo**

- (207) 753-9152
- [Bruce.Russo@maine.gov](mailto:Bruce.Russo@maine.gov)

### **District 4 (MidCoast, Waldo, Knox, Lincoln, Sagadahoc)**

**Suzanne Freitas**

- (207) 596-4256
- [Suzanne.Freitas@maine.gov](mailto:Suzanne.Freitas@maine.gov)

### **District 5 (Central Maine, Kennebec, Somerset)**

**Elizabeth Jacques**

- (207) 287-7180
- [Elizabeth.Jacques@maine.gov](mailto:Elizabeth.Jacques@maine.gov)

### **District 6 & 7 (Piscataquis, Penobscot, Washington, Hancock)**

**Suzanne Freitas**

- (207) 596-4256
- [Suzanne.Freitas@maine.gov](mailto:Suzanne.Freitas@maine.gov)

### **District 8 (Aroostook)**

**Lorraine Curtis**

- (207) 493-4107
- [Lorraine.Curtis@maine.gov](mailto:Lorraine.Curtis@maine.gov)